



For more information
about Mack & Co.'s
solutions and services,
visit: mackco.com

Or contact us at:
646.831.8794
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Summary

Strategic advisory and direct investment solutions specifically tailored to meet the complex needs of global family offices and institutions.

Mack & Co., LLC and affiliates is a Dallas, TX-based independent advisory firm focused on providing strategic advisory, direct investments and customized investment solutions to the family office and institutional marketplace.

Known for our exceptional resources, broad experience and problem-solving approach to highly structured transactions, we have deep domain expertise across a variety of alternative asset classes, including private equity and real estate. A key benefit is the access we provide to our proprietary network of external strategic partners and internal peer-to-peer network of family offices and institutional clients.

About Us

Uncommon insight, exceptional capabilities and innovative thinking working for you.

Identify Pain Point. Our clients look to us for thoughtful, objective and experienced advice and customized solutions to their unique investment challenges. Our process starts by first understanding your goals and objectives. Only then do we create a customized solution for your investment or business issues. We provide a differentiated and global perspective by working closely with a core group of strategic and alliance partners, family offices, institutions and managers to access proprietary deal flow, execute transactions, make capital introductions and form customized investment vehicles specific to your distinct needs.

Best-in-Class Strategic Partners. Mack & Co. is asset-class and industry-agnostic. Rather than offering model portfolios or off-the-shelf investment products, we understand that you have unique challenges and objectives that require a bespoke investment solution tailored to your particular situation. By identifying and leading a team of best-in-class investment partners or solution providers, we work together to execute a customized strategy or transaction mandate to suit your needs. In many instances, Mack & Co. also serves as an outsourced management team member or advisor to our clients during or after implementation.

Customized Solution. The outcome of our process is a customized solution that is tailored to your specific needs, interests and risk/reward profile. We then provide the thought leadership and an outsourced team to lead the execution and implementation of your vision. By working with our global network of strategic partners, Mack & Co. can help you move seamlessly from an investment idea through implementation and execution and ultimately deliver a customized solution that meets your desired outcome.



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Solution: Family Offices & Institutions

Objective advice and customized investment solutions,
aligned with your interests.

Strategic Advisory. Mack & Co.'s strategic advisory solutions deliver unique insights and value-added, innovative financial solutions to family offices and institutional investors. Leveraging our global network of strategic partnerships, we focus on helping you solve your "pain points" and achieve your strategic and financial objectives. This allows us to be asset-class agnostic and knowledgeable across an array of disciplines.

Direct Investments. We work with family offices and institutions to set up customized direct investment programs and make direct investments in a variety of sectors and alternative asset classes, ranging from private equity to real estate. Our customized, turnkey solutions include program setup, investment sourcing, transaction structuring, and post-transaction monitoring and reporting.

Transaction Structuring and Syndication. We provide advice, consultation and outsourced support to investors that need institutional-quality thought leadership and execution in structuring or syndicating complex and time-sensitive transactions. We advise clients throughout a deal's life cycle, from origination to execution and post-transaction integration and monitoring.

Customized Direct Investment Vehicles. We create and manage customized investment vehicles for alternative asset classes, ranging from private equity to real estate. Our turnkey programs include club or direct investments with a single investor or commingled investments with multiple like-minded investors. We also create and participate in tailored investment products and private label funds dedicated to family offices, institutional clients and independent asset managers.

Solution: Operators & Managers

Capital introduction and fund formation services.

Capital Introduction. We have developed significant relationships with family offices and institutional investors seeking direct investments with best-in-class operators and managers. We leverage our extensive knowledge of client preferences to deliver targeted introductions to the world's leading family offices and institutions.

Fund Formation Services. We provide comprehensive fund formation consulting services for clients at all stages of growth, from inception to institutionalization. These services include fund positioning, terms and fees, product ideation and fund strategy, business growth positioning, end-to-end fund setup, marketing, and organizational best-practice review.